

***my*netball**  
**HELP**

**HOW TO GUIDE**

**Online Forms**

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### Online Forms

#### Introduction

Online forms are used in MyNetball to streamline the member registration process. This enables clubs and associations to minimise their registration management time.

In order to activate online registration an online registration form and products in order to sell registration to members.

Go to the Registration Menu/Product Management

Registration Dashboard

Product Management

Signup Form Management

Disclaimers

Gateway and Payments

Reports

De-Registration Request

#### Steps to complete

1. Create Product (Product Management)
2. Disclaimer
3. Sign up Form Management
4. Payment Gateway
5. Create any required Custom Fields

### Membership Products

#### Step 1

This topic covers the creation of products which represent your membership types that are available to your members.: These products can be re-used from season to season simply by editing key information. Its only necessary to create a product once, then update its availability/price and registration component on a seasonal basis.

#### Product Management

#### Prerequisites

Registration types set up (refer to your Association)

#### Instructions

Go to Registrations/Product Management/ Add Member Subscription Product

### Configure Membership Signup - Products ?

#### + Add Member Subscription Product

Then complete the following sections with the relevant information.

**Name:** Add a product name (your membership product ie Senior Player)

**Category:** Select 'membership' from the drop down menu

**Description:** describe your product, i.e. "Senior Playing Membership"

**Price:** there are 2 pricing methods available:

**Simple,** tick simple if you would like to offer a single price for the membership

**Advanced,** use advanced pricing and nominate different prices depending on the number of family members that register (family discount) see Family Relationships

\* you must ensure your pricing is greater than any liabilities on the registration otherwise the product will not save.

**Amounts Payable:** this section shows the liabilities for the association Registration Type which is selected in section 13.

**Class:** make sure 'membership subscription/registration' is ticked

**Number Available:** this is optional, enter a number to restrict sales of this membership

**Available From:** Enter a date when the product is available for purchase

**Available until:** Enter a date the product is no longer available for purchase

**Active:** use this to control if the product is available for purchase, checked makes it available

**Sort Order:** using numbers you can control which products appear first on your sign up form

**Subscription Settings:**

Start and End Date refer to the period with which this product is valid for the person in the organisation (membership period).

**Person Role:**

this is the role the person will have in your organisation, in the example our member will have the Player/Senior role  
\*its important to assign the correct role to make searching/filtering people easier

**Registration Settings:**

Automatically Register Participant To: select the Association which is running your competition (there could be multiple depending on which playing season you are involved in)

Registration Type: this is the Registration Type your member will be assigned to the association, this will either be Junior or Senior for a player membership

Registration Period: this is the period your member is to be registered into, it could be the current period or if your association allows a future period.

\*once these details are selected, the registration liabilities will appear under the pricing set.

**Discounts:**

General Discount, if you would like to offer a discount on this item enter a dollar amount

Discount Description, describe the discount you are offering eg "summer season discount"

Early Discount, enter a dollar value which will be subtracted from the product price

Early Discount Cutoff Date, enter this date to end the above discount, for example you may run early bird discounts upto the week before competitions begin

\*discounts are applied on the calculated price for the item, this includes if the item is using advanced pricing, ensure that your discounts do not allow a price below the liabilities.

**Update:** save your product by pressing update.

Add more products clicking on **Back to Management Screen**.

## Edit Registration Type/Product ?

[Back to Management Screen](#)

Registration Type/Product details									
Name *	<input type="text" value="Junior Player Registration"/>								
Category	<input type="text" value="Membership"/>								
Description	<input type="text" value="Please select this item if you are a player from U/9 to Inters or aged 17 &amp; under"/>								
Price *	<input checked="" type="radio"/> Simple <input type="radio"/> Advanced <input type="text" value="\$110.00"/>								
Amounts payable for the selected registration type	<table border="1"> <thead> <tr> <th>Age Range: 0-17</th> <th>Total:8.00</th> </tr> </thead> <tbody> <tr> <td>Netball Australia</td> <td>0.00</td> </tr> <tr> <td>Netball South Australia</td> <td>0.00</td> </tr> <tr> <td>Southern Hills Netball Association</td> <td>8.00</td> </tr> </tbody> </table> <p>The price entered <b>should</b> be greater than the maximum total across all age ranges, plus any discounts entered below.            If the organisation name is in red it means that the registration type at that level is inactive - all parent types must be active before you can make this product active.</p> <input type="checkbox"/> Allow product pricing to be discounted if the participant qualifies for a registration discount	Age Range: 0-17	Total:8.00	Netball Australia	0.00	Netball South Australia	0.00	Southern Hills Netball Association	8.00
Age Range: 0-17	Total:8.00								
Netball Australia	0.00								
Netball South Australia	0.00								
Southern Hills Netball Association	8.00								
Class *	<input checked="" type="radio"/> Membership Subscription/Registration <input type="radio"/> Saleable Item								
Number available <span>1</span>	<input type="text"/>								
Available from	<input type="text" value="1/01/2018 12:00 AM"/>								
Available until	<input type="text" value="25/06/2018 12:00 AM"/>								
Active	<input checked="" type="checkbox"/>								
Sort order	<input type="text" value="0"/>								
Subscription settings									
Start Date	<input type="text" value="1/04/2018"/>								
End Date	<input type="text" value="31/03/2019"/>								
Person Role *	<input type="text" value="PLAYER:JUNIOR"/>								
Registration settings									
Automatically Register Participant To:	<input type="text"/>								
Registration Type	<input type="text"/>								
Registration Period	<input type="text" value="2018"/>								
Discounts									
General Discount	<input type="text" value="0.00"/>								
Discount Description	<input type="text"/>								
Early Discount	<input type="text" value="0.00"/>								
Early Discount Cutoff Date	<input type="text"/>								
<input type="button" value="Update"/>									

## Signup Disclaimer

### Step 2

As a club association a disclaimer in regards to the sale of a membership/product may be required. The Signup disclaimer item allows you to create and edit a customised disclaimer suitable to your organisation.

To create a disclaimer click on Registration/Disclaimer/Add new Disclaimer

## Disclaimer Page Maintenance ?

+ Add new Disclaimer

A window will open with a word like window which can be typed or pasted into with relevant information (Use the paste from word button). This disclaimer will display at the bottom of the screen when a member finishes the registration process.

Click on **Update** once the disclaimer is created.

A Disclaimer is provided with the NA Membership Signup Form Template available in forms. **It is recommended that the default disclaimer be used with any new registration forms.**

## Registration Form

### Step 3

#### Creating Online Signup Form

Using sign up forms can reduce administration in your organisation by allowing people to sign themselves up with either an existing MyNetball ID or if they are new to Netball, they could register a new ID

The sign up forms are accessible via the Club Finder on the MyNetball Portal, they can also be linked from your organization's website, as well as directly sent to your members through the share links (explained further below)

Go to Registrations and select Signup Form Management

Signup Form Management

#### Instructions

Click on 'Add new online registration form'

Signup Form Manager ?

+ Add New Online Registration Form

Select NA Membership Signup template from the dropdown and press Refresh

This step pre populates the form with the most common options

#### Select Registration Form


NA - Membership Signup Template ▼

Refresh

Complete each of the following sections of the form, due to the size there are 3 separate screenshots



## General Settings

Template Name	Membership Signup Template
Form Type	Membership
Title	* Membership Signu
Welcome Page Top Description	Please update with a welcome message 
Status	INACTIVE
Sort order	8
Disclaimer	GLOBAL DISCLAIMER
Entity Disclaimer	No Disclaimer
Contact Name	* Shanna Wheare
Contact Email	* shanna.wheare@ne

**Title:** Enter a descriptive title for your form such as 'Club Name Registration Form' Only one registration form is required for a club, there is no need to put a year in the Title.

**Top Description:** This appears once someone begins the signup process, in this space instructions should be provided to participants about the registrations for eg Trial Dates etc.

**Status:** this controls whether people can use your form to sign up or not, if inactive then the form is inoperable

**Sort Order:** if your organisation has multiple forms, this controls the order in which they are presented to potential members



**Disclaimer:** Global Disclaimer as determined by Netball Australia and the State Organisations.

**Entity Disclaimer:** If your organisation has a personal disclaimer this is where the disclaimer is available for use.

**Contact Name:** this would be name of the person responsible for the signup

**Contact Email:** email address of the above so contact can be made if there are problems

## Payment Settings

Payment Gateway (Online Payments) 	NO GATEWAY
Allow Offline Payment	<input checked="" type="checkbox"/> <span>Note - you will need to manually accept and reconcile offline payments if payment is made offline.</span>
Allow Part Payment	<input type="checkbox"/>
Automatically add processing fee	<input type="checkbox"/> Apply to online payments <input type="checkbox"/> Apply to offline payments Fixed Charge: AUD <input type="text" value="0.00"/> plus Variable Charge: <input type="text" value="0.00"/> % of transaction amount
Offline Payment Description	(Not entered) 
Currency format	\$
Tax Description	GST
Tax rate (%)	10.0

**Payment Gateway:** if you have applied for a [MyNetball Payment Gateway](#) to accept online payments you can select it from the drop down. **Do Not Use the MPS for registration payment in South Australia.**

**Allow Offline Payments:** in addition to online payments if you would like to offer members an option to make payment directly into a bank account you will need check this box. It is important to note that all offline payments must be reconciled in the system.

**Allow Part Payment:** When the automated part payments feature is utilised by an organisation, the player has the option of making their payment in one, two, three or four instalments. The first instalment will be made immediately, and any future instalments will continue in the subsequent calendar months on the 15th. Further instructions are located [here](#)

**Automatically add processing fee:** this option when enabled adds either a fixed charge, variable charge or both to the online or offline payment methods. This payment processing fee is added to the total amount payable for the membership products. Fixed charge minimum is 31c and variable Charge of 1.78% (For further information contact Netball SA)

**Offline Payment Description:** enter the offline payment instructions you would like your members to follow, such as listing BSB and Account numbers for direct deposits

**Currency formats and Tax fields:** these can remain unchanged, unless your organisation doesn't collect GST in which case set the rate to 0

## Form Fields

### Personal Fields

Personal fields are fixed in the order they appear on the form. Some fields (which are disabled) must appear on all forms.

\*If selected, Parent/Guardian fields will only display on the form if the person being registered is under 18. The fields are in a fixed order - First Name, Last Name, Email, Mobile, Address.

Select Field	Mand. Field
<input type="checkbox"/> Title	<input type="checkbox"/>
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/>
<input type="checkbox"/> Middle Name	<input type="checkbox"/>
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Gender	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Date of Birth	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Email Address	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Home Phone	<input type="checkbox"/>
<input checked="" type="checkbox"/> Mobile Phone	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Address	<input checked="" type="checkbox"/>
<input type="checkbox"/> School	<input type="checkbox"/>
<input checked="" type="checkbox"/> Next of Kin / Emergency Contact - Name	<input type="checkbox"/>
<input checked="" type="checkbox"/> Next of Kin / Emergency Contact - Number	<input type="checkbox"/>
<input checked="" type="checkbox"/> Parent/Guardian fields*	<input checked="" type="checkbox"/>

### Other Fields

#### Available Fields

Custom Fields [NSA]
(1st Preference - Group with friends - please include their first name)
11- 16 Yr Old Clinic - Please specify which area of play you would like
2nd Preference - Group with friends - please include their first name
Are you a current member of Netball SA?
Australian Visa Number
Briefly outline your experience
Coach Name
Coach Phone Number
Competition you are currently participating in
Completed online Community Coach GPs?
Current Grade Played
Do you have a disability?
Do you have any Allergies? [INACTIVE FIELD]
Do you have any existing medical conditions? [INACTIVE FIELD]

#### Selected Fields

Field	Mand. Field	Display Name	Group Name
<input checked="" type="checkbox"/> Do you identify as Aboriginal and/or Torres Strait Islander?	<input checked="" type="checkbox"/>		This information keeps N
<input checked="" type="checkbox"/> In which country were you born?	<input checked="" type="checkbox"/>		This information keeps N
<input checked="" type="checkbox"/> Are there any languages other than English spoken at home?	<input checked="" type="checkbox"/>		This information keeps N
<input checked="" type="checkbox"/> If Yes, then what other languages are spoken?	<input type="checkbox"/>		This information keeps N
<input checked="" type="checkbox"/> Do you have a disability?	<input checked="" type="checkbox"/>		This information keeps N
<input type="checkbox"/> Existing Medical Conditions / Injuries / Allergies	<input type="checkbox"/>		Medical Information
<input type="checkbox"/> Regular Medication	<input type="checkbox"/>		Medical Information

### Personal

**Fields:** this lists the current fields that will display on the form, some are mandatory to ensure the integrity of your members information is intact.

**Other Fields:** this tab allows you to add your own custom fields

**Group Name:** Use group name to keep questions of a similar nature together on your form. Note. Spelling must be exact.

## Registration Type/Products

Displayed as radio buttons: customer will be able to choose one item only.

Available Registration Type/Products	Selected Registration Type/Products
Adelaide Thunderbirds School Holiday Clinic	
Adelaide Thunderbirds School Holiday Clinic	
Adelaide Thunderbirds School Holiday Clinic	
Coloured Shirt Program	
2022 Coach	

## Saleable items

Displayed as check boxes: customer will be able to choose multiple items.

Available Saleable items	Selected Saleable items

## Advanced Settings

### Behaviour Options

- ☐ Manually approve all new registrants
- ☒ Create logins for new registrants
- ☒ Omit pay by credit card information from offline payment form
- ☐ Display payment split information if possible
- ☒ Allow signups on behalf of family members
- ☐ Allow no team preference

### Syndication Options

- ☐ Syndicate to Entity Teams
- ☐ Syndicate to affiliated CLUBS
- ☐ Syndicate to affiliated ASSOCIATIONS
- ☐ Syndicate to affiliated ZONES
- ☐ Syndicate to affiliated REGIONS
- ☐ Syndicate to affiliated STATES
- ☐ Syndicate only to direct affiliates

Save

**Registration Type/Products:** the membership products you have created for your members should be listed on the left, move them over to the right to make them available on this form for your members.

### Behaviour Options:

**Manually Approve** all new registrants - leave this off

**Use simple mode process** - if listing only one product this option skips the product select step making a more streamlined process

**Display payment split information if possible** - this options gives the member a breakdown of their membership payment as per the products Amounts payable section ie, Association fee, State Fee

**Create logins for new registrants-** leave this on so new members to MyNetball get a login sent to them after the sign up process.

**Omit pay by credit card information from offline payment form-** if your organisation does not manually process credit card information, tick this box

**Allow signups on behalf of family members-** this option allows a parent or sibling to login to MyNetball and either sign up an existing [family member](#) or create a new family member. This does not need to be enabled for the advanced pricing to work.

**Syndication Options:** more to come on this, make sure all are unchecked

Click 'Save'

Note - The HTML link for each form will be available to copy in the 'Share Link' section on the form. You can promote this link however you wish.

Once participants click on this link they will be taken to the online screen to login or register, then can complete the online signup process.

## Payment Gateway

#### Step 4

MyNetball is integrated with an online payment processing service, to be known as the MyNetball Payment Service. The service will be integrated tightly with the platform to allow a seamless way for clubs, associations and leagues to offer online payments for their membership services, events, carnivals and other online services. This service give club members the ability to pay their registration via credit card if it is more convenient.

Key features of the service:

- Easy to get connected
- No setup fee
- No ongoing monthly fees
- Standard transaction fee across all transactions (current introductory fee 1.75%)
- Integration to the MyNetball system
- Money automatically transferred to nominated bank account
- Settlements are processed 5 days from transaction (to allow for disputes)

## Custom Fields

### Step 5

Sometimes in the Membership signup forms an additional question might be required by an organisation. This could include questions such as:-

Do you have a police clearance?

What date does your police clearance expire?

What is your preferred playing position?

These are all questions which might be information a club or association would like to collect.

Go to the People Menu/Person Custom List/Person Custom Field

To create a custom questions click *Add New Custom Field*

## Custom Person Field Management ?

[+ Add New Custom Field](#)

\*NOTE: It is important to check existing available questions in the membership signup form prior to creating a custom question.

A new window will open displaying the box below.

FIELD DETAILS	FIELD TYPE	DISPLAY OPTIONS	CHILD ORGS	APPLY TO ROLE/SUB-ROLE	ACTIVE	SORT ORDER
<b>Name</b> <input type="text"/>	<b>Type</b> <input type="text" value="Text Box"/>	<input type="checkbox"/> Prohibit editing by child admin user <input type="checkbox"/> Prohibit editing by logged in participants	<input type="checkbox"/>	<b>Role Sub-Role</b> <input type="text" value="Select Role(s)..."/>	<input checked="" type="checkbox"/>	<input type="text" value="0"/>
<b>Description</b> <input type="text"/>	<b>Options</b> <input type="text"/>					<input checked="" type="checkbox"/> <input type="text" value="0"/>

**Name:** Name of custom field

**Description :** Question that appears in the Membership signup form

**Type:** Select type of question to be asked and the format for answer.

**Options:** Selection of responses if specified, each response will need to be comma delimited i.e GS, GA, WA,C, WD,GD, GK.

**Display Option:** Prohibit editing only if required

**Apply to Role:** All custom questions can be directed to a specific role, this means only the participants with the selected role type will see question.

**Active:** The field needs to be active to be available for the form.

**Sort Order:** Give the item a number.

Once all the information is filled in click on Update A new field is created.

Note: It is important that you do not name custom fields the same, each field needs its own name.

Please take time to review the registration form before creating custom fields, in the additional fields tab of the membership form there are numerous custom fields available for use from Netball Australia, South Australia and some associations.